

**ADDENDUM II**  
**Office of Community Development**  
**Written Inquiries & Responses for**  
**Emergency SFO Program Management for**  
**Coronavirus Assistance Program**  
**RFP #107140-063**

1. Does the OCD anticipate a limit on the number of vendors to support this contract?

**Answer: There is no specific limit on the number of vendors chosen as a result of this SFO.**

2. Can we bid just on sub tasks under each task? Or even portions of sub tasks?

**Answer: The Offer must be in response to all of the tasks and services listed in SFO Part 2, Scope of Work/Services.**

3. Can bidders submit financial statements via completely separate package? Via email only?

**Answer: Offerors should submit financial statements for non-publically traded entities as a separate package, but it should be delivered with the technical and cost offers as described in SFO, Section 1.6 Offer Submittal.**

4. **General.** Please confirm that requests for forms or information, unless otherwise specified, should be provided only by the prime contractor, not the subcontractors. (For example, financial statements or discussion of ongoing litigation, bankruptcy, etc.)

**Answer: That is correct. The certification statement, Attachment I, and other information requested in the SFO should be submitted by the prime contractor, and is not required to be submitted by any subcontractor.**

5. **Section 1.8.4, page 11.** This section requires that bidders submit “copies of its latest three (3) years of financial statements.” Please specify how many copies are desired.

**Answer: Two hard copies of financial statements should be submitted.**

6. **Section 2.5, Case Manager 2, #1, page 53.** The requirements for Case Manager 2 includes the statement that “A combination of education and relevant experience will also be considered.” Please clarify the level of relevant experience that would be required for candidates with no Bachelor’s degree, in addition to the two years of relevant experience that is already required.

**Answer: The amount of relevant experience to substitute for a Bachelor’s degree would generally be on a year for year basis. So four (4) years of relevant experience could normally be substituted for a Bachelor’s degree. OCD would have the final decision on whether any particular person’s relevant experience was as adequate substitute for the Bachelor’s degree.**

7. **Section 2.5, Case Manager 1, #1, page 54.** The requirements for Case Manager 1 includes the statement that “A combination of education and relevant experience will also be considered.” Please clarify the level of relevant experience that would be required for candidates with no Bachelor’s degree, in addition to the two years of relevant experience that is already required.

**Answer: See the answer to Question 6.**

8. Page 8, Section 1.5  
Schedule of Events. Given the complexity of the bid and the fact that questions won’t be answered until June 15, would OCD consider extending the due date for two weeks to July 8, 2021 so that they can get a full competitive response?

**Answer: OCD does not anticipate revising the Due Date for Offer submittal given in SFO, Section 1.5 Schedule of Events.**

9. Page 9, Section 1.6  
Bids must be submitted by hard copy to OCS’s physical location; however, the USPS does not deliver to that address. Please confirm other vendors such as UPS or FedEx can deliver to that location.

**Answer: FedEx and UPS both deliver to the physical address given in SFO, Section 1.6 Offer Submittal.**

10. Page 13, Section 1.8.5 Question 8  
This question indicates that bidders can propose to deliver services via multiple mechanisms, i.e., phone, mobile office, contractor-provided facilities, but Section 1.8.7.4 states that the contractor may be required to provide or maintain facilities. Please confirm whether a facility is required or if that is at the contractor’s discretion.

**Answer: OCD will make a determination if office facilities are needed based on the Program needs.**

11. Page 16, Section 1.8.7.3  
*The state shall provide the Grant Management System (the system of record and the program application used for processing applicants during the application process) and hosted by the State.* Please provide overview of this system including functions that system provides as well as any gaps in the system that impact the ability to operate this program.

**Answer: OCD and the state Office of Technology Services (OTS) continue finalizing software design for the grant management system of record (system) as U. S. Department of Treasury (Treasury) provides more information. Moreover, the approval of the OCD Housing Assistance Fund (HAF) Plan by Treasury will provide the needed requirements for system development. The goal is to have a system available for application intake and case management upon approval of the HAF plan by Treasury. Because the HAF plan template and associated guidance has not been issued by Treasury yet, the timeframe for**

**this approval is unknown. The SFO provides the ability for an Offeror to recommend other grant management solutions for consideration as an alternative.**

**12. Page 42, Section 2.1**

Bid indicates that full scope of work may not be awarded to one vendor. Is Department open to bids for portions, but not the entire scope of work? If yes, should vendors identify which tasks and services in Part 2, SOW that they are bidding on?

**Answer: See answer to Question 2.**

**13. Page 44, Section 2.2**

Please provide the total funds available for cash assistance and the projected number of households to be served.

**Answer: The budget for the services to be awarded under SFO 107140-063 is not known at this time. The Treasury allocation for the State of Louisiana is \$146,668,557. Administrative costs, including program management, are capped at 15%. The State cannot exceed this percentage for all administrative overhead costs.**

**14. Page 44, Section 2.2**

Bid requires staffing for in person within 30 days and by phone within 15 days. What is the anticipated volume of applications on a daily/weekly or monthly basis?

**Answer: OCD is waiting on guidance and data from Treasury. Research is being conducted to understand the need in Louisiana.**

**15. Page 44, Section 2.2**

Question 3 states that the contractor may be required to secure building leases and equipment for all front-office and back-office operations and may be tasked with responsibility for all or part of the costs of operating the Centers. Please confirm that if this task is assigned to the contractor, they would have the opportunity to develop the cost model and proposed locations, seek state pre-approval, and be reimbursed for these costs separate from the labor hours requested for this SFO.

**Answer: OCD will determine if a location is needed and will need to approve any location chosen and the associated costs which would then be paid through a pre-approved another Direct Cost (OCD).**

**16. Page 43, Section 2.2**

This section states that the State may award specific tasks to one or multiple contractors. Can contractors bid on specific tasks and provide labor rates for the positions that are specific to the scope of work they are bidding on, or must they provide labor rates for all positions?

**Answer: See the answer to Question 2.**

**17. Page 46, Section 2.2, Paragraph 1**

Will the toll-free number currently in place for the Louisiana US Treasury ERAP remain in place to support this program? Or is an alternative toll-free number needed? Please provide the average monthly, daily, and weekly volume of calls currently received related to application processing from the state's centralized toll-free number if available. Additionally, please provide average handle times for calls to the centralized number.

**Answer: No. This Program will require a separate toll-free number. The call volume is not known.**

**18. General**

Is the desire of the state with this RFP to procure Project Management and Oversight of the existing vendor, or to reprocur the work done by the existing vendor today?

**Answer: There is no existing vendor that has been assigned work on the Program in the SFO. It is not currently anticipated that a successful Offeror will be tasked with oversight of another vendor or replace another vendor, but such outcomes are not precluded by the terms of the SFO.**

**19. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2, Page 43 of 92

"The Contractor(s) will be responsible for entering information related to these tasks in the applicable State-approved system of record on a daily basis."

Can the state provide more information on what the State's approved system of record is, it's name, it's capabilities, technology stack, and who developed it?

**Answer: See the answer to Question 11.**

**20. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2, Page 43 of 92

"The Contractor(s) will be responsible for entering information related to these tasks in the applicable State-approved system of record on a daily basis."

Due to the high risk of these programs, is the State-approved system of record FedRamp High compliant? If not cloud hosted, does it meet comparable security standards?

**Answer: See the answer to Question 11.**

**21. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

"processes for determining eligible awards and amounts"

Does the State's approved system of record provide automated eligibility determination and calculation of benefit amounts through configured business rules or is eligibility determined manually by workers?

**Answer:** All eligibility determinations are the responsibility of the vendor. OCD does anticipate that the grants management system will provide a limited amount of automation related to calculations and 3<sup>rd</sup> party data to assist in the eligibility determination. Any other system proposed by an Offeror would be expected to have similar functionality.

**22. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

"processes for determining eligible awards and amounts"

What is the typical processing time in the State's approved system of record?

**Answer:** See the answer to Question 11.

**23. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

"processes for determining eligible awards and amounts"

How does the State's approved system of record and process handle surges in demand?

**Answer:** See the answer to Question 11.

**24. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

Support the State Office of Technology Services (OTS) “in development, procurement and/or implementation of Program systems based on requirements developed by the State, its planning consultants, and the Contractor(s) and to which designated personnel of the State will have complete and full access during the entire term of the contract. Tasks for further modifying and developing the management information systems are as follows.

Can the state further clarify what the "management information systems" are that the vendor will need to further modify and develop? What technology are these system(s) built upon?

**Answer:** See the answer to Question 11.

**25. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

"Support the State Office of Technology Services (OTS) “in development, procurement and/or implementation of Program systems based on requirements developed by the State, its planning consultants, and the Contractor(s) and to which designated personnel of the State will have complete and full access during the entire term of the contract."

The SFO states that vendors will support the State Office of Technology Services (OTS) "in development, procurement and/or implementation of Program systems based on requirements developed by the State, its planning consultants, and the Contractor(s)". Is the expectation that the awarded vendor should bid staff to make updates to the State's approved system of record?

**Answer: The expectation is for the Offeror to have personnel who have the ability to make recommendations for business functionality in the system of record if required.**

**26. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

"All necessary interfaces with the relevant State management information systems, in particular, the systems for tracking payments to grant recipients."

Can the state provide list of interfaces supported by the State's approved system of record?

What middleware platform does the state currently use?

**Answer: See the answer to Question 11.**

**27. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 44 of 92

Secure the necessary personnel, to be able to take applications in-person within thirty (30) days and over the phone within fifteen (15) days of the contract start date.

Can the State provide anticipated volume of in-person and phone applications vs. anticipated volume of online applications for both HAF and ERAP?

**Answer: Currently, this is not known. Typically, the majority of applicants apply online, especially homeowners.**

**28. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (1): Operations of Program Page 45 of 92

10. Make ready all electronic documents, with necessary protections of privacy.

Can the State provide further clarification on what is meant by "make ready"?

**Answer: 'Make ready' means being able to produce the electronic documents in the event of a public records request (PRR).**

**29. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.1): Program Operations and Administration Page 46 of 92

Maintain responsibilities associated with supporting the State Office of Technology Services (OTS) based on requirements developed by the State, its planning consultants, and the Contractor(s) and to which designated personnel of the State will have complete and full access

during the entire term of the contract. Tasks for developing the management information systems are as follows. Contractor will review, recommend modifications and develop and conduct user acceptance testing on software requirements for:

Can the state confirm if the vendor is only being asked to review, recommend modifications, and conduct testing of software and is not being asked to perform (develop/code) the modifications? Is there a vendor already contracted to perform the identified modifications?

**Answer: That is correct unless the vendor recommends an alternate software. Any modification to alternate software s would then be made by the Offeror.**

**30. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 46 of 92

Take applications via web forms, telephone and face-to-face interviews. The application intake system must be an accessible application intake process that allows applicants of all backgrounds to complete the application process.

Is the State's expectation that the current web application (<https://www.lastaterent.com/>) will be used for application intake? If yes, are telephone and face-to-face applications entered into this system as well?

**Answer: That is not the current expectation.**

**31. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 46 of 92

Take applications via web forms, telephone and face-to-face interviews. The application intake system must be an accessible application intake process that allows applicants of all backgrounds to complete the application process.

The State's current web application (<https://www.lastaterent.com/>) states that "While you are able to complete your application using a mobile device, we encourage applicants to use a computer if they have access to one."

As national trends show that these programs are highly accessed through mobile devices, are there plans to make the State's current web application mobile friendly/responsive?

**Answer: The functionality may exist but is not encouraged based on the information required for an application.**

**32. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

The Contractor must be able to use Program Policies and Procedures to determine if an



applicant is eligible for the Program and any payments. This process will involve collecting confidential and personal identification and other financial documentation to prove eligibility. The Contractor should be experienced and knowledgeable in data and document collection and should be prepared to securely house confidential information. The Contractor should also be experienced and knowledgeable regarding federal regulations and how to calculate federal benefits and adjusted median incomes (AMIs).

Does the State's approved system of record contain interfaces with Experian Precise ID for Identity Verification and Fraud Prevention and Experian Biz ID for Commercial Fraud Prevention and Authentication?

**Answer: See the answer to Question 11.**

**33. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

5. Secure data sources and verify sources of funds that were paid to applicant as related to any applicable duplication of benefits policy or for income verification.

Can you confirm if the State's approved system of record currently interfaces with any of the following in order to verify sources and prevent duplication of benefits?

- The Louisiana Housing Corporation's Low-Income Home Energy Assistance Program (LIHEAP) system
- Louisiana's DCFS SNAP/TANF system
- Louisiana's Unemployment Insurance system
- Interface with the IRS

**Answer: This is correct for some of the 3<sup>rd</sup> party data listed in the ERAP Program. OCD anticipates this may be available for future programs as well.**

**34. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

5. Secure data sources and verify sources of funds that were paid to applicant as related to any applicable duplication of benefits policy or for income verification.

Does the State's approved system of record support geofencing to better prevent the duplication of benefits with local jurisdictions' programs?

**Answer: See the answer to Question 11.**

**35. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

6. Calculate the amounts of assistance due to qualified applicants, prepare all documents



related to the commitment and disbursement of this assistance by the State, and ensure program files are thoroughly documented to demonstrate eligibility and award determination.

Does the State's approved system of record support the documentation of all case related activities, including audit history?

**Answer: This is a business requirement for any software used in the Program.**

**36. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

7. Provide applicants with assistance from case manager, who will advise applicants on the following:

- Understanding Program guidelines and policies
- Application status
- Award explanation and breakdown

Does the State's approved system of record support the generation of both paper and electronic notices to inform the applicant of eligibility decisions and explanation of benefits?

**Answer: This is a business requirement for any software used in these Program.**

**37. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

7. Provide applicants with assistance from case manager, who will advise applicants on the following:

- Understanding Program guidelines and policies
- Application status
- Award explanation and breakdown

Does the State's approved system of record support the ability for automated contact to the applicants at the following points in the process?

- At the time of registration
- At the time of submission
- At the time the application has been moved forward for eligibility review
- At the time where additional information may be needed the provides specific instructions on what is needed and a link to provide the additional info/upload
- At the time of award
- At the time of denial with option to appeal with link provided to expedite appeal
- At the time of payment
- At the time of appeal award or denial

**Answer: This is a business requirement for any software used in the Program.**

**38. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

7. Provide applicants with assistance from case manager, who will advise applicants on the following:

- Understanding Program guidelines and policies
- Application status
- Award explanation and breakdown

Does the State's approved system of record support the generation of both paper and electronic notices in multiple languages? If so, which languages are supported?

**Answer: See the answer to Question 11.**

**39. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

9. Communicate with the applicants regarding the status of their application, requests for additional information, or problems that may arise in conjunction with the application. Provide online solutions for applicants to view status and progress of their project.

Does the State's current web application (<https://www.lastaterent.com/>) provide the ability for applicants to check the status of their application electronically?

**Answer: Yes, it does provide that ability.**

**40. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

11. The Contractor must have the ability to process award payments using the system provided by the OCD and track those payments by household. The Contractor must be able to issue payments to third parties (i.e. mortgage lender, landlord, utility company) in a timely and efficient manner

Does the State's approved system of record integrate with any payment platforms to take a payment file and execute benefit payments as a check?

**Answer: See the answer to Question 11.**

**41. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.2): Case Management Services Page 47 of 92

13. Document all communications with the applicants regarding the status of their application and subsequent related processes, requests for additional information, or problems that may arise in conjunction with the application in the system of record.

Does the State's approved system of record provide the ability for workers to record and document case notes?

**Answer:** This is a business requirement for any software used in the Program.

**42. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.3): Account/Reporting and Closing Page 48 of 92

1. Account for and reconcile all funds (a) requested and received from the State, (b) disbursed to applicants, (c) in process or in suspension, (d) returned by applicants (e) returned as a result of grant recapture, and (f) returned by applicants and recipients who decide to no longer participate in the Program (g) Record and upload confirmation of EFT and checks cleared in system of record. Clear evidence should be in each grant file demonstrating where and when payment was made.

Does the State's approved system of record have interfaces that automatically update the case record when an EFT or check has cleared, cancelled, or returned or is the expectation that a worker will need to do this manually?

**Answer:** See the answer to Question 11.

**43. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.3): Account/Reporting and Closing Page 48 of 92

1. Account for and reconcile all funds (a) requested and received from the State, (b) disbursed to applicants, (c) in process or in suspension, (d) returned by applicants (e) returned as a result of grant recapture, and (f) returned by applicants and recipients who decide to no longer participate in the Program (g) Record and upload confirmation of EFT and checks cleared in system of record. Clear evidence should be in each grant file demonstrating where and when payment was made.

Does the State's approved system of record provide the ability for a worker to capture and document the suspension of funds or return of funds?

**Answer:** See the answer to Question 11.

**44. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.3): Account/Reporting and Closing Page 48 of 92

2. Provide reconciliation reports and other schedules and reports to the SPM on a prescribed periodic basis established by the State.

Does the State's approved system of record have reporting capabilities? If yes, what technology is used? If yes, Is the contractor expected to develop reports in this system based on requirements from the State?

**Answer:** See the answer to Question 11.

**45. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.3): Account/Reporting and Closing Page 48 of 92

2. Provide reconciliation reports and other schedules and reports to the SPM on a prescribed periodic basis established by the State.

Can the state provide examples of what data they would expect to see in the requested reconciliation reports?

**Answer: Reconciliation reports should include the data identified in the SFO, page 48: Account for and reconcile all funds (a) requested and received from the State, (b) disbursed to applicants, (c) in process or in suspension, (d) returned by applicants (e) returned as a result of grant recapture, and (f) returned by applicants and recipients who decide to no longer participate in the Program (g) Record and upload confirmation of EFT and checks cleared in system of record. Clear evidence should be in each grant file demonstrating where and when payment was made.**

**46. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.4): Applicant Relations Page 48 of 92

1. Provide PAC staff to support inquiries made by the applicants via walk-ins, appointments, phone, email, or online submission. The Contractor will provide as an ODC the necessary equipment, including a toll free phone number to accept and log all inquiries. PAC support will be provided from 8:00 AM to 5:00 PM, Central Time, Monday through Friday, excluding State holidays, unless otherwise approved or requested by the State.

The SFO states "The Contractor will provide as an Other Direct Cost (ODC) the necessary equipment, including a toll free phone number to accept and log all inquiries."

The state's current web application (<https://www.lastaterent.com/>) provides a toll free number (877-459-6555) for applicants to call. Is the expectation that the vendor establish a new number and supporting telephony to support the establishment of a new call center or will the vendor just be providing call center staff?

**Answer: Yes. The Offeror will NOT just be providing call center staff, but will be providing all the technology, management and staff necessary to a successful call center.**

**47. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.4): Applicant Relations Page 48 of 92

6. Develop a mediation (appeal) process to resolve disputes applicants raise in grant determination.

Does the State's approved system of record have an appeals module for documenting and managing applicant appeals?

**Answer: See answer to Question 11.**

**48. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.5): Document Management Page 48 of 92

1. Maintain current storage and retrieval of applicant documents, applicant-related emails, written correspondence, training material, and Program policy and procedures (along with information leading up to the policy and procedures decisions) in an electronic environment for quick retrieval according to State and Federal guidelines for record retention. All documents and materials are the State's property.

Does the State's approved system of record have electronic document management capabilities or is the expectation that the vendor will install and establish a content management solution for the storage and retrieval of these documents?

If the state has an electronic document management solution, what is the technology?

**Answer: See answer to Question 11.**

**49. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.5): Document Management Page 48 of 92

2. Process, scan and upload documentation into the respective systems of record and/or a virtual location to be determined by the State. This may include documentation for existing applications and any other documentation resulting from quality assurance reviews.

Does the State's approved system of record provide scanning and upload capabilities. If no, is the expectation that the vendor will install and establish scanning and upload functionality or will the State be willing to provide these capabilities for the vendor to use?

**Answer: This is a business requirement for any software used in the Program.**

**50. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.5): Document Management Page 49 of 92

4. Perform mail intake/outbound services.

Is it the State's expectation that the vendor will be responsible for the costs associated to materials and postage related to mailings or will the State provide the materials and postage?

**Answer: The Offeror is responsible for these expenses.**

**51. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.5): Document Management Page 49 of 92

5. Coordinate with other functional areas to execute targeted mass mailings (letter campaigns).

Does this include electronic, print or both?

**Answer: It includes both electronic and print mailings.**

**52. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.6): Anti-Fraud, Waste and Abuse (AFWA) Coordination Page 49 of 92

1. Perform process management, file review, reporting and document management, as required for the following:

- a. Internal and external audits (federal, State and Legislative);
- b. Define and perform analytic outlier reports;
- c. Potential fraud investigations; and,
- d. Responses to public record request(s), subpoenas, and prosecutorial support.

Does the State's approved system of record provide logs of IP addresses, login attempts and location of program applicants?

**Answer: See answer to Question 11.**

**53. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.6): Anti-Fraud, Waste and Abuse (AFWA) Coordination Page 49 of 92

1. Perform process management, file review, reporting and document management, as required for the following:

- a. Internal and external audits (federal, State and Legislative);
- b. Define and perform analytic outlier reports;
- c. Potential fraud investigations; and,
- d. Responses to public record request(s), subpoenas, and prosecutorial support.

Does the State's approved system of record provide logs of program applicant profile data changes?

**Answer: This is a business requirement for any software used in the Program.**

**54. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.6): Anti-Fraud, Waste and Abuse (AFWA) Coordination Page 49 of 92

2. Develop and manage internal quality control processes to ensure consistency among a large number of staff.

Does the State's approved system provide a QA/QC module that allows supervisors to review case actions?

**Answer: This is a business requirement for any software used in the Program.**

**55. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.6): Anti-Fraud, Waste and Abuse (AFWA) Coordination Page 49 of 92

3. Develop anti-fraud, waste and abuse policies and procedures, subject to State approval.

For purposes of fraud detection and prevention, would the State allow the selected vendor to securely export program data to a vendor system (proprietary and secure cognitive Fraud analytics tech stack, which could be managed in the State's cloud environment) in order to perform Fraud analytics?

If no, how is the State currently profiling potentially fraudulent data?

**Answer: It may be considered upon further discussions after the award of the contract(s). The successful Offeror(s) will be required to provide an AFWA plan for approval by OCD.**

**56. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.6): Anti-Fraud, Waste and Abuse (AFWA) Coordination Page 49 of 92

3. Develop anti-fraud, waste and abuse policies and procedures, subject to State approval.

Does the State have existing policies/procedures that are aligned to the State's approved system of record? If so, please elaborate what they currently are.

**Answer: The HAF plan has not been approved by the U. S. Department of Treasury. The successful Offeror(s) is required to create policies/procedures to align with all Federal guidelines and the approved HAF plan.**

**57. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 – Task (2.9): Reporting Page 50 of 92

1. Create reports to track performance, inventory, staffing levels and status of applicants and grant recipients throughout the process.

Does the State's approved system provide reporting features for status of applicants and grant recipients?

**Answer: This is a business requirement for any software used in the Program.**

**58. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.4 Technical Requirements Page 51 of 92

Not applicable to this SFO.

The SFO states that "Technical Requirements" are not applicable to this SFO however there appear to be many system related requirements in Part 2: Scope of work/services.

Is the expectation that the selected vendor will not be implementing any technology or making any changes to the State's approved system of record and will only be providing recommendations/providing staff/operate the program?

**Answer: See answer to Question 11.**



## **59. PART 1: ADMINISTRATIVE AND GENERAL INFORMATION**

Section 1.10 Technical and Cost Offers Page 19 of 92

The State requests the following:

- One (1) Original (clearly marked “Original”) and seven (7) numbered paper copies of the technical offer. All should be clearly marked technical offer.
- Two (2) portable drives (i.e., USB flash drive) of the entire technical offer in PDF and Word Format.
- All should be clearly marked technical offer.
- One (1) Original (clearly marked “Original”) and two (2) numbered copies of the cost offer. All should be clearly marked cost offer.
- Two (2) portable drives (i.e., USB flash drive) of the entire cost offer in Word and Excel format. All should be clearly marked cost offer.
- If applicable, Offeror should also submit one (1) paper copy and one (1) portable drive of the redacted version of the offer. All should be clearly marked Redacted.

NOTE: Financial statements for any Offeror who is a non-publicly traded entity should be submitted separately from the technical offer. Two (2) hard copies of the appropriate financial statements should be submitted and clearly marked “Financial Statements”.

In lieu of paper copies, would the State consider accepting electronic submissions through email, file upload, or other digital mechanism?

**Answer: Offers will only be accepted in accordance with SFO Section 1.6.**

## **60. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.2 Tasks and Services Page 44 of 92

In coordination with OCD, create an operational plan and cash flow projections for the expenses of the Program and assistance payments

Can State provide information on existing housing assistance programs and offer any intelligence related to recent demand or funding size to guide pricing efforts?

**Answer: See answer to Question 11.**

## **61. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Please clarify if call center representatives work in a virtual or physical location. If the latter, are they anticipated to be located in the Program Assistance Centers?

**Answer: Current expectation is the call center staff would be located within a Program Assistance Center.**

**62. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Will call center representatives require access to the application and applicant information, including PII?

**Answer: Yes, that access will be required.**

**63. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Will call center representatives be required to support multiple languages? If so, which languages will be required?

**Answer: This may be required based on an identified need.**

**64. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Does the State's approved system of record keep track of call center interactions with applicants? If so, is there automated integration between the State's approved system of record and the call center telephony?

**Answer: Call center representatives are required to log notes within the grants management system of record.**

**65. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Are there existing scripts, knowledge articles or job aids that are available to call center representatives?

**Answer: No, the successful Offeror(s) is required to create all call center training material, scripts, and standard operating procedures.**

**66. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Will call center representatives take applications over the phone? If yes, will they enter application information or will the applicant be required to do the entry?

**Answer: Yes, call center representative may take applications over the phone.**

**67. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Is the vendor required to provide Quality Assurance, call monitoring, call recording and reporting for call center activities?

**Answer: Yes, the successful Offeror(s) will be required to provide those activities.**

**68. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.1 Scope of Work Page 42 of 92

If awarded the full scope contained within this SFO, this scope will include processing of applications, including entering into appropriate arrangements with subcontractors and third party vendors, disbursing funds, monitoring compliance, providing intake services, including call center services, case management services, customer service, document retrieval and collection, data processing, sharing, and reporting, or other services as determined by the OCD, along with completing all other activities required to close out the Program.

Is the vendor required to complete any IVR design or set up for the call center services associated with this program?

**Answer: See answer to Question 11.**

**69. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.5 Required Staffing Page 53 of 92

Case Manager 1 may also provide support with day-to-day project management activities, which may include outreach events, fielding and responding to inquiries made by applicants, document management, and other case tasks as directed by the OCD. All call center representatives are expected to bill at Case Manager 1 level.

Please clarify call center representative responsibilities versus Case Manager 1 responsibilities.

**Answer: See SFO, Part 2, Task 2.2 for a description of case management activities. Call center activities are those normally associated with call centers. See the SFO, page 53 for the job description of a Case Manager 1.**

**70. Part 2: SCOPE OF WORK/SERVICES - PROGRAM MANAGEMENT SERVICES**

Section 2.5 Required Staffing Page 55 of 92

Clerical/Admin Assistant (This position may be used as a receptionist at a housing assistance center or elsewhere subject to approval by the SPM.)

Please clarify any differences between a housing assistance center and a Program Assistance Center (PAC)

**Answer: The housing assistance center and the Program Assistance Center are same.**